

## A. Introduction

These instructions describe the mandatory offer format and the approach for the development and presentation of offers. Format instructions must be adhered to, all requirements and questions in the RFO must be responded to, and all requested data must be supplied. Offers and contracts must be submitted in hardcopy for all sections identified below. Offers must also be submitted in softcopy, on a Compact Disk (CD), using Microsoft Office 2000 (or newer version).

It is the vendor's responsibility to ensure the offer is submitted in a manner that enables the evaluation team to easily locate all response descriptions and exhibits for each requirement of this RFO. All offer submissions must be clearly labeled "BIS – RFO DOF-0043-06."

It is the responsibility of the vendor to ensure that the offer is received by Finance by the date and time specified in Section I, Key Action Dates, at the following location:

Department of Finance  
Attention: Vicki Huntsman  
Business Services  
915 L Street, Room G390  
Sacramento, CA 95814

## B. Offer Format

The offer must be submitted on the date specified in Section I, Key Action Dates. The offer must be submitted in the number of copies and format specified below.

This section describes the content and format of the individual sections of the offer. The vendor must organize the offer into the following sections. Each section must be tabbed. All pages in the offer must be standard 8.5" x 11" paper. The pages in each section must be sequentially numbered. Page numbers must be located in the same page position throughout the offer. Figures, tables, charts, etc., must be assigned index numbers and should be referenced by these numbers in the offer text and in the offer table of contents. Figures, etc., must be placed as close to text references as possible.

A table of contents for the entire document must be included indicating where each required section is located. The master copy must be marked "MASTER COPY." All documents contained in the master offer package must have original signatures and must be signed by a person who is authorized to contractually bind the proposing firm. All documents contained in the contract package must have original signatures and must be signed by a person who is authorized to contractually bind the proposing firm. All additional offer sets may contain photocopies of the original package.

Offers must address the requirements in Section II, Statement of Work and Section III, Administrative Requirements, in the order and format specified in each section. The offer must respond to all requirements.

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The following must be shown on each page of the offer:

RFO DOF-0043-06  
Name of Vendor  
Offer section number  
Page number  
Exhibit number (if applicable)

The cost information must be submitted in a separate sealed package. The cost package must be marked "SEALED COST INFORMATION, RFO DOF-0043-06 – DO NOT OPEN."

The following number of copies of the offer must be submitted:

**Volume I: Response to Requirements**

Hard copy (1 Master and 5 copies)

Softcopy (1 Master and 1 copy)

**Volume II: Completed Contract**

Hardcopy (4 STD 213s with original signatures, and 1 MSA)

Softcopy (1 Master, 1 copy)

**Volume III: Cost Information**

Hardcopy (1 Master and 5 copies)

Softcopy (1 Master and 1 copy)

**B.1 Volume I: Response to Requirements**

**B.1.1 Cover Letter**

The cover letter must be on vendor's official business letterhead stationery and signed by an individual who is authorized to bind the vendor's firm contractually. The signature must indicate the title or position that the signer holds in the firm. The letter shall identify the vendor's manager who will be the point of contact for this contract. An unsigned cover letter shall be a basis for rejection.

**B.1.2 Response to Requirements**

**Section I – General Items**

1. Table of Contents
2. Executive Summary

The Executive Summary should condense and highlight the contents of the offer to provide a broad understanding of the entire offer and facilitate the evaluation of the offer by the state. The Executive Summary should include conclusions and generalized recommendations.

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The Executive Summary must also provide a concise profile of the company, emphasizing the history, and current status of the organization, including but not limited to:

- Company ownership and location of offices
- Number of years in business, including number of years providing services specific to this RFO
- Background and history of company
- Organizational chart showing the staffing lines of authority

## Section II – Response to Administrative Requirements

1. Exhibit III-A Letter of Intent
2. Exhibit III-B Conflict of Interest/Confidentiality Certification
3. Exhibit III-E List of Proposed Subcontractors
4. Exhibit III-F Customer References
5. Exhibit III-G Vendor Experience Summary
6. Exhibit III-H Proposed Staff Experience Summary
7. Exhibit III-I Proposed Resource Staffing Form

### 8. Proposed staff resumes

### 9. PMP Certification

### 10. DVBE Response

### 11. Small Business Certification (if applicable)

### 12. Secretary of State Certification (if applicable)

### 13. Workers Compensation Liability Insurance

### 14. Payee Data Record (Std. Form 204)

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## Section III – Response to Requirements

1. Written response to all requirements identified in Section II, Statement of Works.
2. Proposed Project Management Plan Overview that describes the vendor's intended overall project management strategy to meet the requirements specified in the Section II, Project Management Approach, including:
  - Approach to Establishing the BIS Project Office
  - Project Schedule (Project Office and Integrated BIS Schedule)
  - Approach to Risk Management
  - Approach to Change Management
  - Approach to Issues Management and Escalation
  - Approach to Communications Management
  - Approach to Quality Management
  - Approach to Cost and Schedule Management
  - Proposed Project Management Tools
3. Deliverables and Milestones (Table II-1)

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<#>Vendor Experience Summary¶  
<#>Proposed Staff Experience Summaries¶  
<#>Proposed staff resumes¶  
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Addendum 1

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**B.2 Volume II – Completed Contract**

This volume must contain four (4) completed and signed contracts, including the Standard 213 form and all riders complete in every detail.

1. Standard Agreement 213 (STD 213), four (4) signed, original copies
2. Statement of Work
3. Vendor's MSA Contract (including rate schedule)

**B.3 Volume III – Cost Information**

Volume III is to be separately sealed and clearly labeled "VOLUME III, COST INFORMATION." This volume will not be opened for evaluation until Volumes I and II have been evaluated and scored as described in Section VI, Offer Evaluation. Volume III must contain the completed cost worksheet.

1. Summary of the resources by classification
2. Estimated resources, hours and cost by fiscal year
3. Total Cost Worksheet Summary